



Appendix B

Library Policy Checklist

Public Services Policies

Public services policies regulate the availability of library services and resources to the community. These might include:

- eligibility for use and registration, including nonresidents, institutions, and governments
- circulation (loans and renewals)
- Internet access
- reservations, overdue, lost, and damaged materials
- fines and fees
- audiovisual services
- interlibrary loan and reciprocal borrowing
- photocopying and copyright
- reference service (scope, depth, and type)
- fees for machine-assisted reference service
- confidentiality of records
- complaints and chain of authority
- programs and special events
- special collections
- exhibits and displays
- outreach services (homebound, institutionalized, handicapped, and bookmobile)
- rules of conduct for library users
- use of the library's meeting rooms
- hours of service

Public Relations

The public relations policy defines the purpose and procedures for a public information and public relations program. The policy must be tailored to the local library, but it might include:

- public relations authority and responsibility
- appropriate media
- scope and emphasis
- distribution of printed materials
- participation of staff and trustees

Volunteers

Policies regarding the volunteer services and support of individuals and groups for the library program might include:

- role and responsibilities
- recruitment and selection
- duties and any limitations
- Friends groups
- recognition and awards

Cooperation with Libraries and Groups

Policies on cooperation define the sharing of resources and the establishment of networks with other libraries, groups, and agencies. Such policies might include:

- need for cooperation
- types of cooperation
- affiliation and reciprocal arrangements
- kinds of libraries, types of groups, and agencies

Relations with Schools

Policies regarding relations with schools specify areas of cooperation and any limitations of services. The policies might include:

- definition of separate functions and objectives
- statements in materials selection, borrowing privileges, and public service policies
- ways of establishing cooperation on local and regional level

Internal Policies

General Management Policies

General management policies provide direction for administrative decisions. These policies generally include:

- organizational authority and responsibility
- budgeting and purchasing
- use of library vehicles and equipment
- inventory and insurance of buildings and contents
- security and emergencies

Physical Facilities Policies

The establishment, use, and maintenance of buildings are delineated in the physical facilities policies. Such policies might include:

- maintenance
- inventory and use of equipment
- site selection criteria for branches and bookmobile stops
- acquisition and ownership
- bulletin boards and distribution of free materials
- handicapped access features/ADA compliance
- disaster/recovery plans

Trustee Policies

The constitution and bylaws of the board of trustees constitute board policy. Specific statements concerning travel expenses and membership in and attendance at professional library organizations should also be added to this section of the policy manual.

Materials Policies

Materials policies should be established to assure that the collection is comprehensive, balanced, and accessible to the public. The policies might include:

- mission and goals
- description of community to be served that includes other community recreational, educational, and informational resources
- responsibility for selection
- criteria for selection and quality of materials
- type and various formats collected (paperbacks, magazines, large-print, microforms, newspapers)
- audiovisual collection (films, videocassettes, videodiscs, audiocassettes, audio books, compact discs)
- scope and emphasis of the collection
- duplication of materials
- collection development and access statements for children, young adults, and adults
- special collections
- maintenance and evaluation of collection (weeding, damaged materials, disposal, and replacement)
- textbooks and materials related to school curricula
- cooperative arrangements, community resources, and other arrangements
- confidentiality of library records
- censorship and controversial materials
- labeling of materials
- citizen complaints and requests for reconsideration
- Library Bill of Rights
- Freedom to Read Statement
- Freedom to View Statement
- Free Access to Libraries for Minors

Gifts and Special Materials

An established policy on gifts allows the library to accept or refuse gifts depending on their value, use, and practicality. The policies might include:

- condition of acceptance of gift materials
- disposition of non-usable gifts
- acceptance of property, paintings, equipment, money, etc.
- denominational literature

- historical materials and writings of local authors
- memorial gifts
- recognition of gifts by the library

Personnel Policies

All personnel policies must comply with the Civil Rights Act of 1964, as amended in 1972 and 1991, which prohibits discrimination because of race, color, religion, sex, or national origin in any term, condition, or privilege of employment. When a library comes under the direct jurisdiction of a local government, personnel policies are often those of the local government. Minor changes are adopted to reflect the schedule of the library, observance of holidays, and other special considerations. The main points of personnel policy include:

- classification and job descriptions
- organizational chart of responsibility
- salary scales
- hiring and promotions
- performance evaluation
- probationary work period
- benefits available, such as insurance, retirement, worker's compensation, etc.
- working conditions and hours of work
- vacation, holidays, sick leave, and overtime
- leaves of absence, with or without pay
- training and continuing education
- attendance at professional meetings
- grievance procedures
- disciplinary actions
- resignation and termination